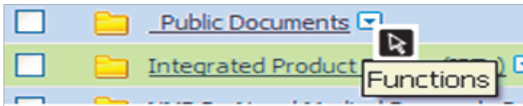


## EDMS Functions



The EDMS *Functions* available to each user are based on the user's role and permissions. Simply by clicking on the item's *Functions* dropdown menu will display a list of functions that are available.

Commonly used Functions include:

- **Download** — Saves a copy of the document to a local location.
- **Open** — Opens the document for viewing.
- **Add Version** — Adds a new version to an existing document.
- **Make Shortcut** — Creates a shortcut, or "pointer", to content located elsewhere in the EDMS.
- **Reserve** — Puts the document "on hold", so other users cannot make changes to it.
- **Unreserve** — Removes the "hold" from a reserved document, so other users may make changes to it.
- **Delete** — Removes an item from EDMS.
- **Add to Favorites** — Adds the item to the user's Favorites; provides quick access to frequently-used items.
- **Properties** — Displays data about an item, such as:
  - **General** — The item's creator, owner, creation date and time, and modification date and time.
  - **Audit** — A history of actions taken on an item.
  - **Categories** — An item's assigned categories and associated metadata.
  - **Versions** — All previous versions of a document, including the date, time, and creator of each version.

## Electronic Document Management

### System (EDMS)

The Electronic Document Management System (EDMS) is part of the MeRITS portfolio and is focused on the reduction, and possibly the elimination, of paper-based systems for regulated and non-regulated documents. This FDA compliant system enables users to collaborate within and across organizations, streamlining processes and mitigating risks through the use of a controlled access information environment. EDMS is certified to meet U.S. Army Information Assurance requirements.

*Note—EDMS is not intended to store Personal Identifiable Information (PII).*

Need Help?

For password assistance or to report technical problems with the EDMS, contact the USAG NEC Help Desk:

**Email:**

USAGDOIMHELPDESK@amedd.army.mil

**Phone:**

(301) 619-2049 or (800) 438-0855



Enterprise Information Technology



## Protect, Project, Sustain

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Email: usamrmc.eitpmo@amedd.army.mil

eIT PMO Website:  
<http://eitpmo.amedd.army.mil>



## Getting Started with Electronic Document Management System (EDMS)...

*Application features at your finger tips!*

eIT PMO EDMS - Livelink  
Revised January 2012

## Logging into EDMS


Follow these steps to log into EDMS:

- Enter the following EDMS URL in the address bar of your internet browser —

<https://edmsp-mrmcit.amedd.army.mil>

(Tip: For easy access in the future, bookmark the EDMS URL as a “Favorite” in internet browser. )

- Enter your EDMS username and password.
  - Remember: Usernames and passwords are case sensitive.
  - Remember: Users must log-in every 60 days per DoD-IA requirements, or accounts will be disabled.
- Click the Log-in button.



Username:   
Password:

## EDMS Workspaces



EDMS workspaces store and organize information according to their intended audience. Each workspace has unique tools and characteristics.

- **Personal “My” Workspace** — A private area assigned to each user to manage and store frequently-used information.
- **Enterprise Workspace** — The area used to store, organize, and work with documents. Within the Enterprise Workspace, subordinate folders are used to collaborate based upon user permissions and the “public” folder is intended for all users. (e.g.—USAMMDA Org Folder)

## EDMS Permissions

Permissions control access to everything in EDMS. Permissions define the information a user sees, where a user can add or modify content, and what functions a user can perform.

## EDMS Settings



EDMS settings include:

- **General tab** — Choose your personal preferences for start page, view, navigation style, and indicator durations.
- **Password tab** — Change your password here at any time. Refer to the password tab for “Password Rules”.


## EDMS Favorites



You can easily access frequently used items by adding them as *Favorites*. When you add an item as a Favorite, you are creating a marker to the item, and then storing it on your “Favorites” page. To add an item to your *Favorites* page, follow these procedures:

- Navigate to the item you would like to add, then click the item’s *Functions* dropdown menu, and then choose *Add to favorites*.

## EDMS Search



The screenshot shows the EDMS Search Bar. It includes a dropdown menu for 'Search Livelihood for', a star icon, a calendar icon, a dropdown menu for 'From Here', and an 'Advanced Search' link. Below these is a search bar with the placeholder text '<Search Bar>' and a 'Go' button.

The EDMS’s Search Bar provides a way to find items through a full search of the entire document.

- Perform a basic search by entering a term or piece of descriptive data about an item in the <Search Bar>, then click on the “Go” button.
- The drop-down menus above the Search Bar allow you to select the type of search to be performed (ask a question, search the system, etc.) and to limit areas to search (from here, all versions).
- The Search Results page lists all items you have permission to see. You can modify your search with the *Refine Your Search* button.

## Add New Items in EDMS



To add an item in EDMS, you must have permissions to do so in the given location.

- Navigate to the location (destination) where you will add the item.
- Click the appropriate button (Add Document or Add Folder); the “Add” window and menu dialog appear.
- If adding a folder, enter a folder name and click Add. If adding a document, Browse to the document (source), highlight it, and click Open; in the EDMS window, enter the document name and click Add.

## Reserve/Unreserve Items/ Add New Version in EDMS

To reserve an item (document) in EDMS, follow these procedures:

- Navigate to the item (document) to be versioned, click the items’ *Functions* dropdown menu, and select *Reserve*.
- (Option) Once at the Reserve page, if you need to make edits/changes to an item (document), click the *Download* button to download the most recent Version of the item to your computer.
- Then, click the *Submit* button.

To unreserve an item (document) in EDMS, follow these procedures:

- Navigate to the item (document) that you reserved, click the items’ *Functions* dropdown menu, and select *Unreserve*.
- If you have made edits/changes to an item (document), check the *Add New Version* button, then chose “browse” to add the new version of the document. Then, click the *Submit* button.
- The edited/changed version of the item (document) is now in EDMS.